



JTPA

Number: D96-13

Serving the People of California

DIRECTIVE

Date: October 29, 1996

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TO: SERVICE DELIVERY AREA ADMINISTRATORS
PRIVATE INDUSTRY COUNCIL CHAIRPERSONS
JTPD PROGRAM OPERATORS
EDD JOB SERVICE OFFICE MANAGERS
JTPD STAFF

SUBJECT: SUBMISSION OF ELECTRONICALLY READABLE MONTHLY AND
QUARTERLY REPORTS

EXECUTIVE SUMMARY:

Purpose:

This Directive establishes policy and procedures for submitting monthly and quarterly Job Training Partnership Act (JTPA) reports to the Job Training Partnership Division (JTPD) in an electronically readable format. These reports include postprogram follow-up terminnee data, JTPA 12 and 12E financial reports, JTPA 10, 10E and 11 participant reports and Individual Participant Data (IPD).

Scope:

This Directive applies to all California Service Delivery Area (SDA) administrative entities and to other entities contracting directly with the State of California, Employment Development Department, to operate programs funded under JTPA.

Effective Date:

This Directive is effective upon its date of issuance.

REFERENCES:

JTPA Section 165.(2)
CFR 627.455

STATE-IMPOSED REQUIREMENTS:

This Directive contains only state-imposed requirements.

FILING INSTRUCTIONS:

Retain this Directive until further notice.

BACKGROUND:

When the Job Training Automation (JTA) Project was initiated, several policy decisions were made between the State Job Training Coordinating Council, JTPD, and SDA Administrators. One of these decisions was that participation in the JTA System is voluntary and SDAs not participating in JTA will provide reports required by JTPD in an electronic medium consistent with JTA report formats.

The implementation phase of the JTA Project has been completed. The remainder of the SDA Administrators were notified in letters dated February 22, 1996, March 29, 1996, and May 1, 1996, of actions needed to meet revised electronic reporting requirements for IPD, postprogram follow-up terminnee data, and financial and participant reports, respectively, since they are not participating in JTA.

The JTA Project has also provided various instructions to JTA SDAs for generating, saving, and transferring reports electronically.

POLICY AND PROCEDURES:

Consistent with previous notifications, all SDAs are required to submit financial and participant reports to JTPD in an electronically readable format (i.e., cartridge tape, diskette, or modem file transfer). The SDAs will be notified when and if hard copy reports are no longer required for validation purposes. Signed hard copy reports will continue to be required for year-end reporting and closeouts.

The SDAs will be notified via Information Bulletins of the reporting deadlines and any special instructions for submitting reports.

ACTION:

All SDAs:

- Bring this Directive to the attention of appropriate staff.

Timesharing JTA SDAs:

- Ensure that staff responsible for submitting expenditure reports have the necessary equipment, software, and/or access to JTA and use JTA to enter financial reports.
- Use the JTA report transfer functions to submit postprogram follow-up terminnee data, financial and participant reports, and IPD to JTPD.

Stand-Alone JTA SDAs:

- Ensure that staff responsible for submitting financial reports have the necessary equipment, software, and/or access to JTA and use JTA to enter financial reports.
- Use JTA to generate the postprogram follow-up terminnee data, participant reports, and IPD.
- Establish internal procedures for submitting financial and participant data in an electronic format using cartridge tape, diskette, or using modem file transfer.

Non-JTA SDAs:

- Modify local JTPA management information systems to provide postprogram follow-up terminnee data, financial and participant reports, and IPD in the file formats required by JTPD.
- Submit these reports in electronic format using cartridge tape or diskette.

INQUIRIES:

Please direct inquiries about this Directive to Diana Samuels, Data Tracking and Reporting Unit Manager, at (916) 657-4343 or your assigned Program Manager.

/S/ VICKI J. JOHNSRUD
Acting Chief